Go Electric AZ

Coaching Engagement Process

Updated: Jan 18, 2025

Introduction

This document is a template for how to engage with clients, including interaction with website forms and Google Drive..

The steps in the typical engagement are:

1. Complete the **Request a Coach** form (required).
   a. If from a hand-written signup sheet at an event, call them or email if a phone number was not provided. Let them know you are following up and ask them the questions on the **Request a Coach** form goelectricaz.org/contact-us/request-a-coach/ . Fill out that form on their behalf while you are on the phone with them, or immediately afterwards.
   b. If sending an email to group or individual, that email should have a link to that **Request a Coach** form for them to fill out themselves.
2. The webmaster receives that **Request a Coach** form and forwards it to the coach he thinks is the best match, based on location, interests, and the coaches' current number of clients. If it's a toss-up, he will forward the form to the group and ask for a volunteer. When a coach is matched, Gordon enters in the Client Tracking spreadsheet.
3. Coach contacts the client using the template tailored to the information on the **Request for Coach** form. If coach is not able to make contact after leaving at least 2 emails and 1 voicemail, send an email to Gordon and the status will be changed to "Unable to contact"
4. Once the initial meeting has been scheduled, ask the client to fill out the Customer Questionnaire and Liability Waiver forms. The webmaster will forward those forms to the appropriate coach when they come in.
5. Prepare for initial meeting (required) by reviewing Customer Questionnaire.
6. Have initial meeting. Update the Client Tracking spreadsheet on Google Docs when that first contact (via emails, phone, or Zoom) has been made.
7. Optional: Create a folder on the Google Drive and file the three forms (Coaching Request, Questionnaire, and Liability). The coach is encouraged to add substantive emails to the folder, but at least a report of the first visit or conversation, and the wrap-up report. The format of those reports is left to the coach.
8. Coach enters status in the Client Tracking spreadsheet on Google Docs whenever the client's status changes.
9. Set up follow up to initial meeting (required).
10. Review installer quotes (optional).
11. Support during installation (optional).
12. Post-engagement follow up (required).
13. One-year follow up (optional).

More Detail on Coaching Steps

3. Respond to request for coaching (required)

The **Request a Coach** form indicates the client's general interests, but rarely enough to understand the full context. The coach sends an email or phone call (depending on the client's preference on the form) covering the following topics:

- Affirm willingness to assist or a commitment to help identify another volunteer coach who can take the case. If unable to assist, omit the remaining topics.
- Provide a link to the coaching description on the web site.
- Provide personalized coaching statement (in PDF format).
- Schedule the initial meeting (in person, Zoom, or phone)

4. Initial meeting scheduled (required)

An initial meeting is preferable to further email exchanges because it allows more immediate interaction and responsiveness. The initial meeting may be virtual (zoom) or in-person at a mutually-agreed upon location, taking into consideration the client's preferences for exposure to viruses, and the coach's need to see the home.

Have the client fill out the Homeowner Questionnaire and Liability forms before that first meeting. Those forms are online and that is the preferred method. If the client is not technically able to fill out the forms online, send her the PDFs as attachments to the email, not a link to the website.

Some clients make specific requests without understanding the full context or options. For instance, a client may request assistance specifically for ductless mini-split heat pumps because someone they know has one while their home has existing ducting when in fact they might be a good candidate for a central heat pump. How to respond to these requests is a judgement call. To the extent possible, the coach should assume the client has incomplete information and respond in the same way as a general request.

5. Prepare for initial meeting (required)

The coach reviews the client's responses to the Homeowner Questionnaire and notes follow-up questions that will further characterize the existing conditions and client priorities. If the coach is unfamiliar with the existing conditions, the coach is encouraged to use the opportunity to become better informed.

Optionally, the coach may request energy usage records from the client and perform an analysis of the home's heat load. This analysis allows comparison with similar homes and later provides a basis for judging installer equipment selections.

If the initial meeting will be a home visit, the coach collects items such as a home visit checklist, handouts, and a flashlight that may be helpful during the visit.

6. Initial meeting (required)

The target duration for the initial meeting is 60-90 minutes. Topics to be covered include:

- Brief self introduction with review of coach's experience, and motives
- Seek clarification, if needed, of client's answers in homeowner questionnaire, particularly reviewing comfort concerns which can be highly subjective
- Subject to performing pre-visit energy analysis, comment on home's energy use relative to similar homes
- For an in-person or virtual home visit and subject to coach's experience, inspect the home's heating and cooling systems, water heater, and electrical panel (details below)
- Subject to coaching experience, comment on additional weatherization opportunities
- Subject to coaching experience, provide general information on heat pumps and heat pump water heaters, and/or discuss system configurations that may be best suited to the home. This discussion should include back-up heating options and integration of controls.
  OPTIONAL: The coach can use standard GoEAZ visual aids during this discussion. The visual aides may be provided by screen sharing in virtual meetings, or by paper handouts during home visits.

Provide resources for identifying suitable installers with a recommendation to obtain quotes from at least three (3) installers

- Discuss questions to ask installers during their visits, including comfort concerns and outdoor unit placement options
- Review available incentive programs and, when possible, approximate incentive amounts.

At the meeting's conclusion, and subject to the coach's experience and availability, the coach informs the client that they can provide further assistance by reviewing installer quotes. The coach explains that s/he can help with understanding and evaluating quotes, and suggest follow-up questions to installers about their quotes.

9. Follow up to initial meeting (required)

The coach prepares a home visit report using the GoEAZ template. At a minimum, the coach sends a follow-up email summarizing the meeting and enumerating recommendations and next steps. The follow-up email may include contact information for installers that the coach judges may be appropriate for the existing conditions and location.

10. Review installer quotes (optional)

This step occurs if the client requests assistance and may involve multiple calls or meetings until the client selects an installer and system configuration. Subject to the coach's experience and willingness, the coach may provide feedback on the following topics:

- Review quotes for completeness (example: location and mounting of outdoor units)
- Clarify type of equipment proposed (example: installers provide options for AC units instead of heat pumps)
- Verify HSPF (and SEER) in the AHRI Directory of Certified Product Performance or NEEP's Cold Climate ASHP List
- Explain quote items, often presented just with model numbers
- Review equipment specifications, including controls

- Review proposed integration with back-up heat sources
- Assess proposed equipment sizing versus home's design heat load
- Support cost comparisons, factoring in possible incentives
- Estimate operating costs and GHG emissions for comparison purposes ● Suggest follow-up questions that clients can ask installers.

11. Support during installation (optional)

It may be helpful to a client to discuss issues or concerns that may arise during installation. Subject to the coach's experience and willingness, the client may contact the coach during the installation and request support.

12. Post-engagement follow up (required)

Some clients follow through with an installation while others decide not to proceed. Within 1 month after an installation or 3 months after the initial meeting, whichever comes first, the coach checks in with the client to determine if the engagement is ongoing or concluded.

If the engagement has concluded, the coach asks the client to complete a post-engagement satisfaction survey. The questionnaire covers the client's satisfaction or issues with the following areas, as applicable:

- Satisfaction with the coaching service
- Installer interactions and the installation
- Post-installation energy costs
- Post-installation comfort (were pre-installation comfort issues, if any, resolved?)
- Able to take advantage of rebates and incentives.
- How likely are they to provide referrals

13. One-year follow-up (optional)

The coach contacts the client to learn their satisfaction or issues with the installed system's comfort, operating costs and efficiency. If the client is willing, the coach obtains post-installation energy use data that allows GoEAZ to estimate the system's operating efficiency.